



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

FOR AGENCY USE		FOR RECORDS MANAGEMENT USE	
Application Date	1. Agency Address Office of Planning and Budget Educational Development Division Room 613 270 Washington Street, SW Atlanta, Georgia 30334	Application Number 79-257	
Application Number		Date Received DEC 17 1979	Date Completed DEC 31 1979
2. Person to Contact Nellie Hoenes		Working Title Director	Telephone Number 656-3800
3. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
4. Dates of Series Earliest _____ Latest _____ to date		5. Records Series Title (followed by title used in office; if different) STATE AGENCY ANNUAL OPERATING BUDGET & EXECUTION ANALYST FILES	
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? The Educational Development Division performs budget analysis and policy planning for the following agencies related to public schools, higher education and scholarships: Department of Education, State Scholarship Commission, Regents of the University System of Georgia. Also, this Division serves as staff for education study groups.			
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: requesting, analyzing, planning and authorizing the expenditure of funds appropriated by the General Assembly for those State agencies related to public schools, higher education and scholarships. Included are: Agency Annual Operating Budget; amendments to Annual Operating Budget; Quarterly Allotment Requests; internal analysis sheet(s); Quarterly Expenditure Reports reflecting how funds were spent; copies of Departments request for transfer of funds and Division analyses. Also included may be reference copies of Minutes of Meetings held by the Fiscal Affairs Sub-Committees of the Senate and House. File is arranged: chronologically by fiscal year; thereunder alphabetically by State agency.			
8. Monthly Reference Rate How often are records referred to which are: One to six months old _____; Seven to twelve months old _____; Thirteen to twenty-four months old _____; twenty-five months and older _____?			
9. Annual Rate of Accumulation of Records Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) _____			

YES	NO	10. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
X		d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	X	h. Is there a duplication of this series in your office, or in another office or agency? portions duplicated in each If yes, where? State agency; Legislative Budget Office; expenditures reflected in the
	X	i. Is this series (or a major portion of it) regularly microfilmed? Annual State Audit
	X	j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|----------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | 1 _____ years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☒ Hold in the current files area _____ month(s) 1 _____ year(s); then
- ☐ Transfer to local holding area, hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☐ Destroy.
- ☒ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>Mellie P. Hoener</i>	11/13/79	<i>J. W. Braselton (mkt)</i>	
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)	Date
		State Auditor/Designee	12-27-79
		Secretary of State/Designee	12-21-79
		Attorney General/Designee	12-28-79